



## LPL Financial Welcomes Financial Advisor Jerry Madden, Jr.

Nov 30, 2023

SAN DIEGO, Nov. 30, 2023 (GLOBE NEWSWIRE) -- [LPL Financial LLC](#) announced today that financial advisor Jerry Madden, Jr., CFA®, has joined LPL Financial's broker-dealer, RIA and custodial platforms. He reported having served approximately \$140 million in advisory, brokerage and retirement plan assets\*, and joins LPL from Cetera.

Located in Paramus, N.J., Madden has more than two decades of experience in the financial services industry, and has earned a reputation as a financial advisor that builds trust with his clients by providing them with customized, comprehensive plans designed to build wealth – while preserving assets and income and protecting families from unforeseen risks along the way.

"It's important to me that my clients are able to take an active role in planning their fiscal futures, and having a basic financial education is a big part of that," Madden said. "I spend time understanding my clients' overall risk tolerance, allocation and time horizon to make sure they match, then I work with them to understand the products and services I offer to help them reach their financial goals."

Looking for more autonomy, as well as the ability to provide an elevated client experience, Madden looked at several firms before selecting LPL as the best fit for his business.

"From their integrated and streamlined platforms to their comprehensive support, everything LPL offers is designed to improve efficiencies and create a best-in-class client experience," Madden said. "I am confident that moving to LPL will allow me to better serve my clients while providing me with the resources and tools necessary to help me grow my business on my terms."

Scott Posner, LPL Executive Vice President, Business Development, said, "We welcome Jerry to the LPL community and applaud his client-centered philosophy. At LPL, we believe that advisors know their clients best and we are proud to provide them with the tools, resources and support necessary to help them build their perfect practice. We look forward to supporting Jerry for years to come."

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### **About LPL Financial**

LPL Financial Holdings Inc. (Nasdaq: LPLA) was founded on the principle that the firm should work for the advisor, and not the other way around. Today, LPL is a leader in the markets we serve, serving more than 22,000 financial advisors, including advisors at approximately 1,100 enterprises and at approximately 560 registered investment advisor ("RIA") firms nationwide. We are steadfast in our commitment to the advisor-mediated model and the belief that Americans deserve access to personalized guidance from a financial advisor. At LPL, independence means that advisors have the freedom they deserve to choose the business model, services, and technology resources that allow them to run their perfect practice. And they have the freedom to manage their client relationships, because they know their clients best. Simply put, we take care of our advisors, so they can take care of their clients.

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Throughout this communication, the terms "financial advisors" and "advisors" are used to refer to registered representatives and/or investment advisor representatives affiliated with LPL Financial.

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*\*Value approximated based on asset and holding details provided to LPL from year-end 2022.*

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